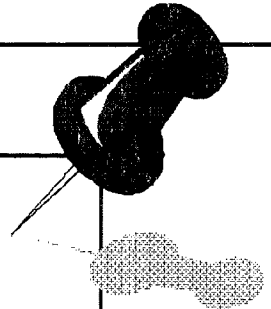


# Fax Cover Page

**SUBJECT:****To: Brewster****Fm: Nick**

**Please look these documents over and give me a call- I'd like to get copies out to everyone by this afternoon so we can start talking about what needs to be done by next week**

**thanks****Nick****To: Brewster Kahle****From : Nick Scharf****For Information Call: (415) 626-1534****At:****Pages: 9****My Fax Number : (415) 626-2430**

To: Brewster, Bruce, John, Harry

Fm: Nick

6/22/95

Planning Schedule and What we signed up for

Here's a first cut at several documents which need to be flushed out for next week's meeting: I'll in general try to drive the writing process so keep things crisp, measurable and consistent. Even though my name isn't next to many things until we get down to the numbers, I'd like to have an almost daily dialogue with everyone on their individual sections-- the time frame we signed up for is pretty aggressive.

1. Plan 95 Schedule. We'll flush this out and add date commitments on Wednesday (6/29)
2. Table of Contents. Should give you a feel for what the plan will end up having in it. The table of contents comes pretty close to what would be in a formal business plan which could be used for fund-raising. We're **not** going to be writing to that level of "polish"- each of the narrative sections should be short, punchy and only go beyond "bullets" where necessary to make understanding clear-- Strategy section should be more narrative than bullets.
3. Corporate objectives. I've written a few-- mainly to demonstrate the format-- whoever has his name next to an objective in the Schedule should adjust the already written objectives as appropriate-- content, date commitment, etc.
4. Administration Objectives. This is an example of departmental objectives - notice that they are over and above those on the Corporate Objectives List. If you have primary ownership for a Corporate Objective, we'll include it on your "departmental objectives" when we publish the document
5. Technology Strategy- this is only the categories we discussed in the planning meeting-- really needs expansion-- same will hold for Distribution, Partnering, etc.

WAIS, Inc.  
Plan 95--Schedule  
June 22, 1994

1. Publish Mission Statement and Philosophy Narrative  
6/28  
Brewster
2. Publish strategy descriptions for:
  - a. Technology  
6/28  
Brewster
  - b. Distribution  
6/28  
Bruce
  - c. Partnering  
6/28  
Brewster
  - d. Marketing  
6/28  
Bruce
3. Prepare first draft of Corporate Objectives  
6/28
  - a. Technology Evolution
    1. Protocols  
Brewster
    2. Complete Publishing System  
John
    3. Client  
Brewster
  - b. Distribution
    1. Defining Services Processes (implementation;  
operations; what the product is)  
John
    2. How services are taken to market & sold  
Bruce
    3. International resellers  
Bruce
    4. Outside distributors  
Bruce
    5. Government  
Bruce
    6. Telemarketing  
Bruce
    7. Protocol Licensing  
Bruce
  - c. Partnering  
Brewster
  - d. Organization Development  
Nick
  - e. Marketing  
Bruce
4. Review and finalize Corporate Objectives and finalize Plan 95 schedule  
6/29  
(Meeting-- Brewster, Bruce, John, Harry, Nick)
5. Develop departmental objectives- major things to accomplish in each  
7/1  
department, in support of and in addition to Corporate Objectives
  - a. Development  
Harry
  - b. Marketing & Sales  
Bruce
  - c. Services  
John
  - d. Administration  
Nick
6. Publish Product Development Plan,  
Harry

- a. Product strengths, weaknesses & missing components  
Harry/Brewster
  - b. Development Plan  
Harry  
Bruce
7. Publish outline description of marketing and sales process  
Bruce
8. Publish Preliminary Revenue Forecast  
(Nick to provide spreadsheet templates)  
Bruce
9. Review and finalize Product Development Plan and Revenue Forecast  
All
10. Publish budget guidelines-- headcounts, planning sheets, expense categories, etc.  
Nick
11. Prepare discussion outline for Department Activities -- objectives and other
  - a. Development  
Harry
  - b. Sales & Marketing  
Bruce
  - c. Services  
John
  - d. Administration  
Nick/Brewster
12. Prepare preliminary departmental expense budgets and capital budgets  
All
13. "Roll-up" budgets, prepare preliminary P&L and Balance Sheet forecasts, review expense budgets and department activity outlines  
Nick
14. Review preliminary budgets, activities and identify changes  
All
15. Revise expense budgets and finalize P&L and Balance Sheet forecasts  
All
16. Clean up Plan 95 Narratives-- (strategy statements, product plan Objectives, etc.)
17. Publish Plan 95  
7/19/94  
All

WAIS, Inc. Plan 95  
Table of Contents  
June 22, 1995

1. Mission Statement
2. Corporate Philosophy
3. Market Description
  - Segments- products, services
  - Size
  - Competition
  - Customers
  - Technology Changes and Related Products
4. Corporate Strategies
  - Technology
  - Marketing
  - Distribution
  - Partnering
  - Financing
5. Corporate Objectives
6. Products
  - Strengths and weaknesses/missing components
    - server
    - protocols
    - publishing services
  - Development Plan
7. Marketing and Sales
8. Revenue Forecast
9. Organization
  - Organization Chart
  - Headcount Forecast
10. Department Expense Budgets
11. Capital Equipment Budget
12. Financial Forecast
  - Assumptions
  - P&L
  - Balance Sheet
  - Cash Flow

**WAIS, Inc. Plan 95**  
**Corporate Objectives**  
June 22, 1995

- 1. Evolve the technology to insure that it is current, complete and provides the basis for dominating the Wide Area Network Publishing Industry as measured by:**

**PROTOCOLS**

- 1.1 Publishing a Protocol Proliferation Plan by July 15, 1994
- 1.2 Publishing a Protocol Design document by August 15, 1994 which addresses how alternative protocols can be integrated or replaced
- 1.3 Developing or partnering a Client prototype by December 15, 1994 which demonstrates the advantages of the WAIS/z39.50 protocol

**PUBLISHING SYSTEMS**

- 1.4 Publishing a design for a complete "turnkey" wide area network publishing system by July 30, 1994. The design should identify missing components and potential partners and development alternatives.
- 1.5 Having in-house and smoothly operational at least to publishing service bureau operations by November 1, 1994.
- 1.6 Announcing a complete, scalable turnkey publishing capability by March 1, 1995

**CLIENT TECHNOLOGY**

- 1.7 Identifying by July 15, 1994, five of the top client development companies to target as marketing, co-development and demonstration partners and having signed letter of intent partnership arrangements by at least three by August 1, 1994.
- 1.8 Developing and having available to market a client tool-kit by September 1, 1994.

- 2. Establish a distribution process for products and services which provides WAIS access to key national and international markets as measured by:**

- 2.1 Telemarketing
- 2.2 Outside distributors
- 2.3 VARS
- 2.4 International Resellers
- 2.5 Protocol licensing
- 2.6 Government applications
- 2.7 Services marketing tools (define the product, define the implementation process and define the operating process)
- 2.8 Sales process and channel identification for services

- 3. Implement a partnering program which insures focus on appropriate partners as defined by the Partnering Strategy document.**
- 4. Put in place the organizational structure which can take the company through the next two years of rapid growth.**

**WAIS, Inc. Plan 95  
Administration Objectives  
June 22, 1994**

- 1. Implement personnel benefits and administration programs which help the company attract and retain the high-quality people as measured by:**
  - 1.1 Having in place a stock option plan to include guidelines for options granted for categories of employees by August 1, 1994
  - 1.2 Implementing a 401K plan for all employees by August 15, 1994.
  - 1.3 Publishing an employee handbook by September 1, 1994 which covers vacation, sick leave, performance reviews, salary structures, health benefits and other topics.
  
- 2. Establish financial controls processes which incorporate proactive measurements against budgets and plans and provide a solid foundation for measuring financial performance as measured by:**
  - 2.1 Conducting a review or audit of fiscal 1994 financial results by September 1, 1994
  - 2.2 Beginning to report monthly financial results against Plan 95 targets by August 15, 1994, using "generally accepted accounting principles".
  - 2.3 Implementing a revised management reporting package which addresses cash flow, sales results vs. budget and forecast, departmental spending vs. plan and forecast, appropriate operational targets.
  
- 3. Establish the process for managing and reporting progress against Corporate and Departmental objectives as measured by:**
  - 3.1
  
4. Recruiting process
5. Planning updates
6. Facility expansion
7. Contract administration
8. Liability Insurance
9. Order processing

**WAIS, Inc. Plan 95**  
**Technology Strategy**  
June 22, 1994

The technology strategy which guide WAIS Inc. development, partnering and licensing efforts over the next 3 years is as follows:

1. Network server evolution.
2. Turn-key publishing capabilities
3. Search engine evolution
4. Retrieval capabilities
  - Adapt to as many formats as possible (SGML, Acrobat, MSWord, Wordperfect, etc
  - Handle integration of large documents really well
  -
5. Indexing
  - Respond to custom indexing, parsing
  - Handle SGML
6. Protocols
  - Proliferate
  - Expand to encompass HTML, etc
  - Insure position with leading Client Vendors